

May 2021

Just a brief note to update you on a couple of matters: -

Superannuation Co -Contributions – Free money from the Government!

If you want to receive the Federal Government's co-contribution grant, the following criteria need to be met by 30th June 2021.

- You need make a member contribution of \$1,000.00 to your Superannuation accumulation account before 30th June 21.
- Be less than 71 years of age.
- Have an income of less than \$39,000.
- And **YOU MUST** lodged a tax return for year ended 30/6/21

If you need clarification, further advice, or assistance lodging your tax return, please contact us directly.

Investments

Following our recent rebalance of investments across most portfolios, we are beginning to see the expected improvements in performance across the board. We will be making further adjustments over the next few weeks, one of which will be the addition of **Hyperion Global Growth Companies Fund (HYGG)** to our investments across selected portfolios.

If you would like more information regarding HYGG, please call either William or Wayne who will be happy to answer any questions or concerns.

The above information that is general in nature. It does not take into account the objectives, financial situation or needs of any particular person. You need to consider your financial situation and needs before making any decisions based on this information. Please arrange an appointment to seek personal financial and taxation advice prior to acting on this information.

PRICE FINANCIAL INTELLIGENCE PTY LTD - ASL: 402367

Ph: 02 9875 2444 • Fax: 02 9481 0594 • PO Box 750, Pennant Hills, NSW 1715 • Unit 11, 1 Central Avenue, Thornleigh NSW 2120 • Website: www.pricefinancial.com.au • Email: info@pricefinancial.com.au